



Purchase Orders

K-12 Cloud

How will I use a Purchase Order?

Purchase Order Purpose

- ▶ Purchase Orders
 - ▶ Used to Support:
 - ▶ Contract
 - ▶ Contract Modification
 - ▶ Miscellaneous Commit: Acts as a contract in OAKS CI for vendors whom will not hold a contract in OAKS CI.

When do I create my PO in OAKS CI?

- ▶ When you sign the contract in DocuSign, you will also create your Purchase Order in your own financial system of record
- ▶ Once complete, you will record the Purchase Order information into OAKS CI

Recording a Purchase Order

- ▶ To record your Purchase Order in Oaks CI navigate to:

- ▶ Logs -> Purchase Orders K-12

- ▶ Click New

The screenshot shows the Oracle Primavera Unifier web application. The top navigation bar includes the Oracle logo, the application name 'PRIMAVERA Unifier', and the user name 'Katie Tuttle'. Below the navigation bar, there are browser tabs for 'Home', 'Talawanda-CSD...', and 'Brown-LSD-CAR...'. The main interface is divided into a left-hand navigation pane and a main content area. In the navigation pane, the 'Logs' folder is highlighted with a red circle, and the 'Purchase Orders K12' folder is selected. A red arrow points from the 'Purchase Orders K12' folder in the navigation pane to the main content area. In the main content area, the 'New' button in the 'File' menu is highlighted with a red circle. Below the 'New' button, there is a table of Purchase Orders K12. The table has columns for 'Title' and 'PO Number'. The table contains 33 items, with the first few rows showing 'Furniture' items with PO numbers ranging from 91503 to 91508. The last row shows 'Commissioning Agent' with PO number 89611.

| Title | PO Number |
|-------------------------------|------------|
| Furniture | 91503 |
| AE-PreCon PO Strike 3 | 89262.000 |
| Furniture | 91503 |
| Treasurer, State of Ohio | 91309 |
| National Road Utility Supply | 91313 |
| Electric | 91314 |
| RNL Hydrant Testing | 90940 |
| Professional Services GMP #3 | 90692 |
| Relocate utility pole | 90749 |
| Builders Risk Insurance | 90677 |
| Builders Risk Insurance | 90677 |
| Relocate gas line | 90608 |
| Relocate gas line | 90608 |
| Notice of Intent - EPA Permit | 90352 |
| Notice of Intent - EPA Permit | 90352 |
| Organizational Meeting | 90251 |
| Organizational Meeting | 9025100001 |
| Commissioning Agent | 89611 |

Record a Purchase Order

- ▶ Complete the General block
- ▶ All required fields are marked with a Red *
- ▶ The PO must be in “Dispatched” status
- ▶ Select PO Purpose
- ▶ Under PO Type select the appropriate record type (**only pick one**) then click select to choose your record

The screenshot shows the Oracle purchase order creation interface. The main window is titled "Purchase Orders K12 - Morris Test - Project No. SFC-080001.01 - Google Chrome". The URL is <https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/open?model=upok&a=form,0&b=upok&id=4&source=cost&>. The interface is divided into several sections:

- General:** Contains fields for Project Number (SFC-080001.01), Project Name (Oak Hills Local Building Project), School District, Facility Name, Title (Morris Test), Vendor Name (Steve's Electrical Contracting), Record Number (PO-002), Creator (Moenique Morris), and Creation Date (07/22/2015 09:42 AM (UTC-8)).
- PO Type:** Contains a note: "NOTE: Only pick one PO TYPE per record." and fields for Contract Name (Morris Test), Change Order Name, Miscellaneous Commit Name, and Miscellaneous Change Order Name. Each field has a "Select..." button. To the right are four "Amount (\$)" fields with values: \$350,000.00, \$0.00, \$0.00, and \$0.00.
- PO Details:** Contains fields for OAKS PO No. (Test 1) and OAKS PO Amount (\$) (\$350,000.00).

Red boxes and arrows highlight specific fields: "Title: Morris Test", "Status: Dispatched", "PO Purpose: Contracts", and the "Select..." button for the Contract Name field. A second window titled "Contract K12 - Google Chrome" is overlaid on the bottom right, showing a table of contract records.

| Contract No. | Contractor Name | Title | Original Contract Completion Date |
|--------------|--------------------------------|-----------------|-----------------------------------|
| 123456 | Joe General Contractor | Test Contract 3 | |
| 072215 | Joe General Contractor | Test - CMR | |
| 001 | Steve's Electrical Contracting | Morris Test | |

Record a Purchase Order

- ▶ In the PO Details section- Ensure you plug in the Purchase Order number into the Record. Choose OAKS or District for financial system used.
- ▶ Do **NOT** plug in the PO amount until completing slides 58-60
- ▶ Under Notification you can choose to notify additional users
- ▶ Attach any necessary documentation

Create New Purchase Orders K12 - Project No. SFC-080001.01 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/checkPermission?model=upok&a=form.0&b=upok&bpcsvim

File Edit View Help

Finish Editing Save Spelling.. Add Attachment Close Window

General Purchase Orders K12

PO Details

OAKS PO No.: 58475

PO Date:

Date Dispatched:

Financial System of Record:

Notes:

OAKS PO Amount (\$): **Not Yet!**

Total Amount (\$):

Line Item Total (\$):

Difference (\$):

Document Publishing

Documents uploaded from your desktop will be published to the Document Manager in the Publish Path listed below.

FilePath:

Publish Path:

Notification

Notify Additional Users/Groups:

PO Distribution Lines

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

User/Group Picker - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/share/project/picker_usergroup?UserGroupPickerId=picker_name

Find List Names from: Oak Hills Local Building Proj Show By: Users/Groups

Users/Groups - Current View: All

33 Item(s) Page 1 of 1 Display 100 Items Per Page

| Name | Company |
|---------------------|---------------|
| A_E | |
| All Project Users | |
| Barbara Taylor | State of Ohio |
| CM-R | |
| Chief of Projects | |
| Commissioning Agent | |
| Consultant | |

Add View Profile Members

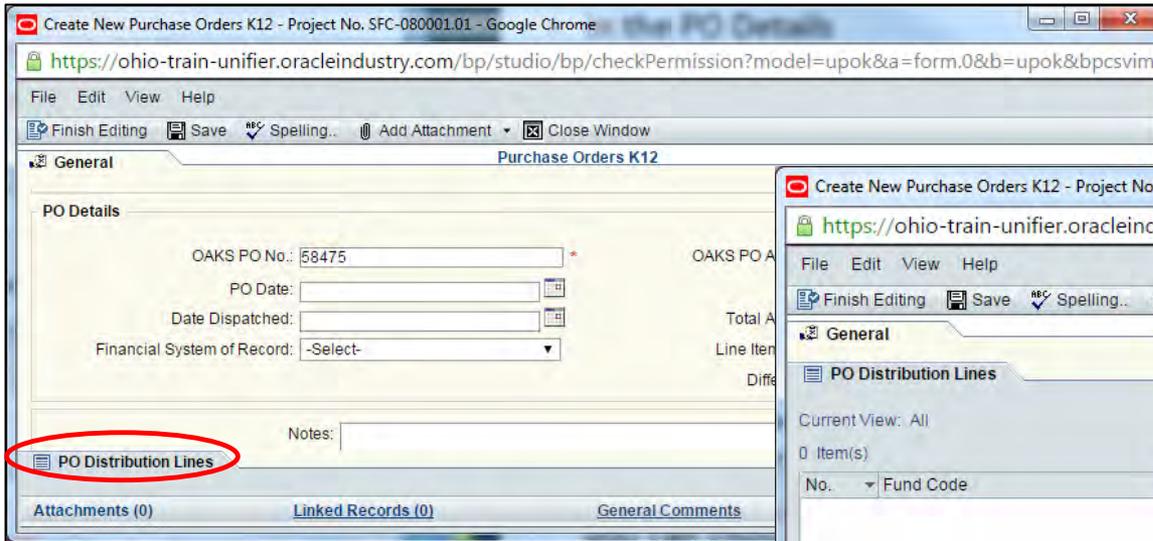
Selected Users/Groups

Name

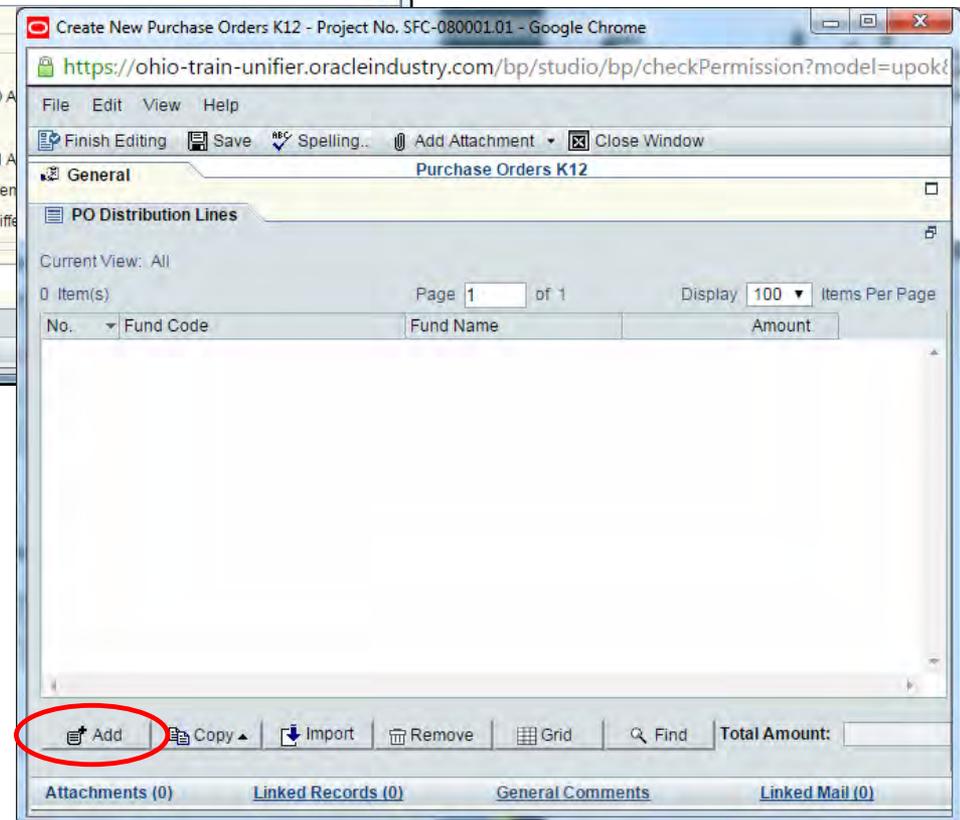
OK Cancel

Fund the PO

- ▶ Click the PO Distribution Lines Tab



- ▶ Click Add



Fund the PO

- ▶ Click Select to choose the appropriate fund code
 - ▶ **Note: If you do not see any funds to choose from, call OAKS CI**
- ▶ Enter a Short Description and Dollar Amount
- ▶ When finished entering information, click OK

Line Item - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/database/itemo

Spelling... Attach X Delete Line Item

Purchase Orders K12 Line Item:

General

Fund Code: OCI-Other-TestFund-0-OCI-1

Fund Name: OCI Test Fund

Short Description: Supplies *

Amount (\$): \$350,000.00 *

Notes:

Hidden

Tab Name:

Attachments (0) [Linked Record](#)

Fund Code - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/fsm/company/funding/listvie

Open Find Close Window

Fund Code - Current View: All

2 Item(s) Page 1 of 1 Display 100 Items Per Page

| Fund Code | Fund Name | Agency |
|---|--------------------------------------|--------|
| OCI-Other-TestFund-0-OCI-1 | OCI Test Fund | OCI |
| SFC-State-Approp-C23014-SFC100000-8950B | Classroom Facilities Assistance Prog | SFC |

Fund the PO

- ▶ When all lines are added, your lines will show up in the PO Distribution Lines tab

The screenshot shows a web browser window titled "Purchase Orders K12 - Test PO - Project No. SFC-080001.01 - Google Chrome". The URL is <https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/open?model=upok&a=form,0&b=upok&srcid>. The interface displays the "Purchase Orders K12" form with the "PO Distribution Lines" tab selected. The current view is "All", showing 2 items on page 1 of 1. The table below lists the distribution lines:

| No. | Fund Code | Fund Name | Amount |
|-----|---|------------------------------|--------------|
| 002 | SFC-State-Approp-C23014-SFC100000-8950B | Classroom Facilities Assista | \$250,000.00 |
| 001 | OCI-Other-TestFund-0-OCI-1 | OCI Test Fund | \$250,000.00 |

At the bottom of the interface, there are buttons for "Add", "Copy", "Import", "Remove", "Grid", and "Find". The "Total Amount" is displayed as \$500,000.00. Below the table, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Finish the PO

- ▶ Go back to the upper form by clicking the General tab
- ▶ Now, type in the dollar amount of your PO that you entered into the Line Item
- ▶ The difference should be \$0
- ▶ Click Finish Editing

Purchase Orders K12 - Test PO - Project No. SFC-080001.01 - Google Chrome

<https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/open?model=upok&a=form.0&b=upok&srcid>

File Edit View Help

Finish Editing Save Spelling.. Add Attachment Close Window

General Purchase Orders K12

PO Details

OAKS PO No.: 58475

PO Date:

Date Dispatched:

Financial System of Record: OAKS FIN

OAKS PO Amount (\$): \$500,000.00

Total Amount (\$): \$500,000.00

Line Item Total (\$): \$500,000.00

Difference (\$): \$0.00

Notes:

Document Publishing

Documents uploaded from your desktop will be published to the Document Manager in the Publish Path listed below.

FilePath: Purchase Orders

Publish Path: Purchase Orders/58475

Notification

PO Distribution Lines

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

Questions?

Please contact OAKS CI Support Desk:

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